



U.S. House of Representatives

COMMITTEE ON ETHICS

Employee Post-Travel Disclosure Form

☒ Original ☐ Amendment

This form is for disclosing the receipt of travel expenses from private sources for travel taken in connection with official duties. This form does not eliminate the need to report privately-funded travel on the annual *Financial Disclosure Statements* of those employees required to file them. In accordance with House Rule 25, clause 5, you must complete this form and file it with the Clerk of the House, B-81 Cannon House Office Building, within 15 days after travel is completed. Please **do not** file this form with the Committee on Ethics.

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001.

1. Name of Traveler: KELSEY M FETZER
2. a. Name of Accompanying Relative: _____ OR None ☒
b. Relationship to Traveler: ☐ Spouse ☐ Child ☐ Other (specify): _____
3. a. Dates: Departure: February 21, 2019 Return: February 22, 2019
b. Dates at Personal Expense, if any: _____ OR None ☒
4. Departure City: Washington D.C. Destination: Memphis TN Return City: Washington D.C.
5. Sponsor(s), Who Paid for the Trip: Jobs for the Future (JFF)
6. Describe Meetings and Events Attended: During the visit to Memphis, meetings and events were focused around the city's efforts to revitalize its economy, specifically how to get individuals on a pathway to economic success.
7. Attached to this form are *each* of the following, signify that each item is attached by checking the corresponding box:
 - a. ☒ a completed *Sponsor Post-Travel Disclosure Form*;
 - b. ☒ the *Primary Trip Sponsor Form* completed by the trip sponsor *prior* to the trip, including all attachments and the *Grantmaking or Non-Grantmaking Sponsor Forms*;
 - c. ☒ page 2 of the completed *Traveler Form* submitted by the employee; and
 - d. ☒ the letter from the Committee on Ethics approving my participation on this trip.
8. a. I represent that I participated in each of the activities reflected in the attached sponsor's agenda.
Signify statement is true by checking the box: ☒
b. If not, explain: _____

I certify that the information contained on this form is true, complete, and correct to the best of my knowledge.

Signature of Traveler: [Signature] Date: 2/26/2019

I authorized this travel in advance. I have determined that all of the expenses listed on the attached *Sponsor Post-Travel Disclosure Form* were necessary and that the travel was in connection with the employee's official duties and would not create the appearance that the employee is using public office for private gain.

Name of Supervising Member: Rep. JACK BERGMAN Date: 2/26/2019

Signature of Supervising Member: [Signature]



U.S. House of Representatives

COMMITTEE ON ETHICS

Sponsor Post-Travel Disclosure Form

☒ Original ☐ Amendment

This form must be completed by an officer of any organization that served as the primary trip sponsor in providing travel expenses or reimbursement for travel expenses to House Members, officers, or employees under House Rule 25, clause 5. A completed copy of the form must be provided to each House Member, officer, or employee who participated on the trip *within ten days of their return*. You must answer all questions, and check all boxes, on this form for your submission to comply with House rules and the Committee's travel regulations. Failure to comply with this requirement may result in the denial of future requests to sponsor trips and/or subject the current traveler to disciplinary action or a requirement to repay the trip expenses.

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001.

1. Sponsor(s) who paid for the trip: Jobs for the Future (JFF) with a grant from Lumina Foundation and The Joyce Foundation

2. Travel Destination(s): Memphis, TN

3. Date of Departure: February 21, 2019 Date of Return: February 22, 2019

4. Name(s) of Traveler(s): Jared Bass, Kelsey Fetzer, Jason Kanter and Heather Painter

Note: You may list more than one traveler on a form only if *all* information is *identical* for each person listed.

5. Actual amount of expenses paid on behalf of, or reimbursed to, each individual named in Question 4:

	Total Transportation Expenses	Total Lodging Expenses	Total Meal Expenses	Total Other Expenses (dollar amount per item and description)
Traveler	\$425.00	\$121.00	\$122.00	NONE
Accompanying Family Member	NONE	NONE	NONE	NONE

6. All expenses connected to the trip were for actual costs incurred and not a *per diem* or lump sum payment. Signify statement is true by checking box: ☒

I certify that the information contained in this form is true, complete, and correct to the best of my knowledge.

Signature: Mary Clagett Date: 2/26/19

Name: Mary Clagett Title: Sr Director of Workforce Policy

Organization: Jobs for the Future (JFF)

I am an officer of the above-named organization. Signify statement is true by checking box: ☒

Address: 122 C St. NW Washington DC 20001

Telephone: 703-517-6368

Email: mclagett@jff.org

Committee staff may contact the above-named individual if additional information is required.

If you have questions regarding your completion of this form, please contact the Committee on Ethics at 202-225-7103.



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TRAVELER FORM

1. Name of Traveler: Kelsey M Fetzer
2. Sponsor(s) who will be paying for the trip: Jobs for the Future Foundation
3. Travel Destination(s): Memphis, Tennessee
4. a. Date of Departure: February 21, 2019 Date of Return: February 22, 2019
b. Will you be extending the trip at your personal expense? ☐ Yes ☒ No
If yes, list dates at personal expense: _____
5. a. Will you be accompanied by a family member at the sponsor's expense? ☐ Yes ☒ No If yes:
(1) Name of Accompanying Family Member: _____
(2) Relationship to Traveler: ☐ Spouse ☐ Child ☐ Other (specify): _____
(3) Accompanying Family Member is at least 18 years of age: ☐ Yes ☐ No
6. a. Did the trip sponsor answer "Yes" to Question 8(c) on the *Primary Trip Sponsor Form* (i.e., travel is sponsored by an entity that employs a registered federal lobbyist or a foreign agent)? ☐ Yes ☐ No
b. If yes, and you are requesting lodging for two nights, explain why the second night is warranted:

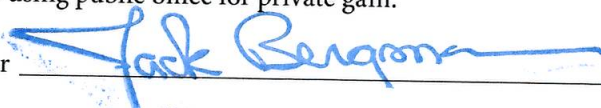
7. *Primary Trip Sponsor Form* is attached, including agenda, invitee list, and any other attachments and contributing sponsor forms: ☒ Yes ☐ No
NOTE: The agenda should show the traveler's individual schedule, including departure and arrival times and identify the specific events in which the traveler will be participating.
8. Explain why participation in the trip is connected to the traveler's individual official or representational duties. **Staff should include their job title and how the activities on the itinerary relate to their duties.**
The trip educated us on workforce development, education, urban development and career and technical training programs.
All of these issues fall under my legislative portfolio and will help me to develop policy for my office in the future.

9. **Is the traveler aware of any registered federal lobbyists or foreign agents involved planning, organizing, requesting, or arranging the trip?** ☐ Yes ☒ No
10. For staff travelers, to be completed by your employing Member:

ADVANCED AUTHORIZATION OF EMPLOYEE TRAVEL

I hereby authorize the individual named above, an employee of the U.S. House of Representatives who works under my direct supervision, to accept expenses for the trip described in this request. I have determined that the above-described travel is in connection with my employee's official duties and that acceptance of these expenses will not create the appearance that the employee is using public office for private gain.

Signature of Employing Member



Date

2/26/2019



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COMMITTEE ON ETHICS

Primary Trip Sponsor Form

This form should be completed by private entities offering to provide travel or reimbursement for travel to House Members, officers, or employees under House Rule 25, clause 5. A completed copy of the form (and any attachments) should be provided to each invited House Member, officer, or employee, who will then forward it to the Committee together with a *Traveler Form* at least 30 days before the start date of the trip. The trip sponsor should NOT submit the form directly to the Committee. The Committee website (ethics.house.gov) provides detailed instructions for filling out the form.

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001. Failure to comply with the Committee's Travel Regulations may also lead to the denial of permission to sponsor future trips.

1. Sponsor who will be paying for the trip: Jobs for the Future (JFF) with a grant from Lumina Foundation and The Joyce Foundation.
2. I represent that the trip will not be financed, in whole or in part, by a registered federal lobbyist or foreign agent. Signify that the statement is true by checking box: ☒ OR
3. Check only one. I represent that:
 - a. The primary trip sponsor has not accepted from any other source, funds intended directly or indirectly to finance any aspect of the trip: ☐ OR
 - b. The trip is arranged without regard to congressional participation and the primary trip sponsor has accepted funds only from entities that will receive a tangible benefit in exchange for those funds: ☐ OR
 - c. The primary trip sponsor has accepted funds from other source(s) intended directly or indirectly to finance all or part of this trip and has enclosed disclosure forms from each of those entities. ☒
If "c" is checked, list the names of the additional sponsors: Lumina Foundation and The Joyce Foundation
4. Provide names and titles of ALL House Members and employees you are inviting. For each House invitee, provide an explanation of why the individual was invited (include additional pages if necessary): See attachments for more detail.
5. Is travel being offered to an accompanying family member of the House invitee(s)? ☐ Yes ☒ No
6. Date of Departure: February 21, 2019 Date of Return: February 22, 2019
7. a. City of departure: Washington, DC
b. Destination(s): Memphis, TN
c. City of return: Washington, DC
8. Check only one. I represent that:
 - a. The sponsor of the trip is an institution of higher education within the meaning of section 101 of the Higher Education Act of 1965: ☐ OR
 - b. The sponsor of the trip does not retain or employ a registered federal lobbyist or foreign agent: ☒ OR
 - c. The sponsor employs or retains a registered federal lobbyist or foreign agent, but the trip is for attendance at a one-day event and lobbyist / foreign agent involvement in planning, organizing, requesting, or arranging the trip was de minimis under the Committee's travel regulations. ☐
9. Check only one of the following:
 - a. I checked 8(a) or (b) above: ☒
 - b. I checked 8(c) above but am not offering any lodging: ☐
 - c. I checked 8(c) above and am offering lodging and meals for one night: ☐ OR
 - d. I checked 8(c) above and am offering lodging and meals for two nights: ☐ If you checked this box, explain why the second night of lodging is warranted: _____



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10. Attached is a detailed agenda of the activities House invitees will be participating in during the travel (i.e., an hourly description of planned activities for trip invitees). *Indicate agenda is attached by checking box:* ☒

11. *Check only one of the following:*

a. I represent that a registered federal lobbyist or foreign agent will not accompany House Members or employees on any segment of the trip. *Signify that the statement is true by checking box:* ☒ OR

b. *Not Applicable.* Trip sponsor is a U.S. institution of higher education: ☐

12. For *each* sponsor required to submit a sponsor form, describe the sponsor's interest in the subject matter of the trip *and* its role in organizing and/or conducting the trip:

JFF selects sites and topics of interest around which to base visits and forums, taking into account

Congressional staff interest, the quality of programs and their relationship to education, workforce and poverty alleviation policy. See attachments for more detail.

13. *Answer parts a and b. Answer part c if necessary:*

a. Mode of travel: Air ☒ Rail ☐ Bus ☒ Car ☐ Other ☐ (specify: _____)

b. Class of travel: Coach ☒ Business ☐ First ☐ Charter ☐ Other ☐ (specify: _____)

c. If travel will be first class, or by chartered or private aircraft, explain why such travel is warranted:

N/A

14. I represent that the expenditures related to local area travel during the trip will be unrelated to personal or recreational activities of the invitee(s). *Signify that the statement is true by checking box:* ☒

15. *Check only one.* I represent that either:

a. The trip involves an event that is arranged or organized *without regard* to congressional participation and that meals provided to congressional participants are similar to those provided to or purchased by other event attendees: ☐ OR

b. The trip involves events that are arranged specifically *with regard* to congressional participation: ☒

If "b" is checked:

1) Detail the cost *per day* of meals (approximate cost may be provided): See attachments for more details,
cost per day of meals follow government per diem rates for Memphis, TN in February.

2) Provide the reason for selecting the location of the event or trip: JFF selected Memphis, TN due to the city's
innovative strategies in addressing education, workforce and poverty policy. See attachments for more detail.

16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:

Hotel Name: The Peabody Hotel City: Memphis, TN Cost Per Night: \$121.00

Reason(s) for Selecting: The geographic location and the hotel offered government per diem rates.

Hotel Name: _____ City: _____ Cost Per Night: _____

Reason(s) for Selecting: _____

Hotel Name: _____ City: _____ Cost Per Night: _____

Reason(s) for Selecting: _____

17. I represent that all expenses connected to the trip will be for actual costs incurred and not a per diem or lump sum payment. *Signify that the statement is true by checking box:* ☒



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COMMITTEE ON ETHICS

18. Total Expenses for each Participant:

<input type="checkbox"/> Actual Amounts	Total Transportation Expenses per Participant	Total Lodging Expenses per Participant	Total Meal Expenses per Participant
<input checked="" type="checkbox"/> Good Faith Estimates			
For each Member, Officer, or Employee	\$425.00 (see attachments for detail)	\$121.00 (see attachments for detail)	\$122.00 (see attachments for detail)
For each Accompanying Family Member			

	Other Expenses (dollar amount per item)	Identify Specific Nature of "Other" Expenses (e.g., taxi, parking, registration fee, etc.)
For each Member, Officer, or Employee	NONE	NONE
For each Accompanying Family Member	NONE	NONE

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001.

19. Check only one:

a. I certify that I am an officer of the organization listed below: ☒ OR

b. *Not Applicable.* Trip sponsor is an individual or a U.S. institution of higher education. ☐

20. I certify that I am not a registered federal lobbyist or foreign agent for any sponsor of this trip. ☒

21. I certify by my signature that the information contained in this form is true, complete, and correct to the best of my knowledge.

Signature: Maria K. Flynn

Date: 1/15/2019

Name: Maria Flynn

Title: President/CEO

Organization: Jobs for the Future (JFF)

Address: 122 C st NW Washington, DC 20001

Telephone: 617-728-4446

Email: mflynn@jff.org

If there are any questions regarding this form, please contact the Committee at the following address:

Committee on Ethics

U.S. House of Representatives

1015 Longworth House Office Building, Washington, D.C. 20515

Phone: 202-225-7103 General Fax: 202-225-7392



U.S. House of Representatives

COMMITTEE ON ETHICS

Grantmaking Trip Sponsor Form

This form should be completed by a public charity or private foundation (both as defined under section 501(c)(3) of the Internal Revenue Code) that provides a grant of funds to another entity to underwrite, in whole or in part, a trip or an event, meal, or activity that will occur during a trip, or a necessary expense that will be incurred during a trip, with express or implicit knowledge or understanding that one or more House Members or employees may participate in or attend that trip or event, or otherwise may be beneficiaries of the gift or donation. Provide a copy of your completed form to the primary sponsor of the trip.

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001. Failure to comply with the Committee's Travel Regulations may also lead to the denial of permission to sponsor future trips.

1. I certify that (name of your organization): TheJoyceFoundation
has been designated a § 501(c)(3) nonprofit charitable organization by the Internal Revenue Service. ☒ Yes ☐ No
2. Name of Primary Trip Sponsor: JobsfortheFuture(JFF)
3. I certify that my organization (check and complete a or b):
 - a. ☒ Has provided a grant, gift, or donation to the above-named Primary Trip Sponsor and conducts an audit or review of its grant, gift, or donation to ensure that the funds are spent in accordance with the terms of its grant, gift, or donation. OR
 - b. ☐ Has had a direct role in the organizing, planning, or conducting of a trip to
Destination: _____ on Date: _____
that is being organized or arranged by the above-named Primary Trip Sponsor.
4. Check only one:
 - a. ☒ My organization does not employ or retain a registered federal lobbyist or foreign agent OR
 - b. ☐ My organization employs a registered federal lobbyist or foreign agent, but their involvement in planning, organizing, or arranging the trip was *de minimis* under the travel regulations.
5. I certify that I am not a registered federal lobbyist or foreign agent for any sponsor of this trip. ☒
6. I certify by my signature that the information contained in this form is true, complete, and correct to the best of my knowledge.

Signature: Ellen Alberding Date: 1-16-2019

Name: Ellen Alberding Title: President

Organization: The Joyce Foundation

Address: 321 North Clark St. Suite #1500 Chicago, IL 60654

Telephone: 312-782-2464 Email: swilkins@joycefdn.org

If there are any questions regarding this form, please contact the Committee at the following address

Committee on Ethics

U.S. House of Representatives

1015 Longworth House Office Building, Washington, D.C. 20515

Phone: 202-225-7103 General Fax: 202-225-7392



U.S. House of Representatives

COMMITTEE ON ETHICS

Grantmaking Trip Sponsor Form

This form should be completed by a public charity or private foundation (both as defined under section 501(c)(3) of the Internal Revenue Code) that provides a grant of funds to another entity to underwrite, in whole or in part, a trip or an event, meal, or activity that will occur during a trip, or a necessary expense that will be incurred during a trip, with express or implicit knowledge or understanding that one or more House Members or employees may participate in or attend that trip or event, or otherwise may be beneficiaries of the gift or donation. Provide a copy of your completed form to the primary sponsor of the trip.

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001. Failure to comply with the Committee's Travel Regulations may also lead to the denial of permission to sponsor future trips.

1. I certify that (name of your organization): Lumina Foundation
has been designated a § 501(c)(3) nonprofit charitable organization by the Internal Revenue Service. ☒ Yes ☐ No

2. Name of Primary Trip Sponsor: Jobs for the Future (JFF)

3. I certify that my organization (check and complete a or b):

a. ☒ Has provided a grant, gift, or donation to the above-named Primary Trip Sponsor and conducts an audit or review of its grant, gift, or donation to ensure that the funds are spent in accordance with the terms of its grant, gift, or donation. OR

b. ☐ Has had a direct role in the organizing, planning, or conducting of a trip to

Destination: _____ on Date: _____

that is being organized or arranged by the above-named Primary Trip Sponsor.

4. Check only one:

a. ☒ My organization does not employ or retain a registered federal lobbyist or foreign agent OR

b. ☐ My organization employs a registered federal lobbyist or foreign agent, but their involvement in planning, organizing, or arranging the trip was *de minimis* under the travel regulations.

5. I certify that I am not a registered federal lobbyist or foreign agent for any sponsor of this trip. ☒

6. I certify by my signature that the information contained in this form is true, complete, and correct to the best of my knowledge.

Signature: _____ Date: 1-16-19

Name: Danelle Howard Title: Senior Vice President

Organization: Lumina Foundation

Address: 30 S. Meridian St. Suites 700-800 Indianapolis, IN 46206

Telephone: 800-834-5456 Email: dhoward@luminafoundation.org

If there are any questions regarding this form, please contact the Committee at the following address:

Committee on Ethics

U.S. House of Representatives

1015 Longworth House Office Building, Washington, D.C. 20515

Phone: 202-225-7103 General Fax: 202-225-7392



ONE HUNDRED SIXTEENTH CONGRESS

U.S. House of Representatives

COMMITTEE ON ETHICS

February 14, 2019

Ms. Kelsey Fetzer
Office of the Honorable Jack Bergman
414 Cannon House Office Building
Washington, DC 20515

Dear Ms. Fetzer:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to Memphis, Tennessee, scheduled for February 21 to 22, 2019, sponsored by Jobs for the Future, with financial support from the Lumina Foundation and the Joyce Foundation.

You must complete an Employee Post-Travel Disclosure Form (which your employing Member must also sign) and file it, together with a Sponsor Post-Travel Disclosure Form completed by the trip sponsor, with the Clerk of the House within 15 days after your return from travel. As part of that filing, you are also required to attach a copy of this letter and both the Traveler and Primary Trip Sponsor Forms (including attachments) you previously submitted to the Committee in seeking pre-approval for this trip. If you are required to file an annual Financial Disclosure Statement, you must also report all travel expenses totaling more than \$390 from a single source on the "Travel" schedule of your annual Financial Disclosure Statement covering this calendar year. Finally, Travel Regulation § 404(d) also requires you to keep a copy of all request forms and supporting information provided to the Committee for three subsequent Congresses from the date of travel.

If you have any further questions, please contact the Committee's Office of Advice and Education at extension 5-7103.

Sincerely,

A handwritten signature in blue ink, appearing to read "Theodore E. Deutch".

Theodore E. Deutch
Chairman

A handwritten signature in blue ink, appearing to read "Kenny Marchant".

Kenny Marchant
Ranking Member

TED/KM:kej

**Congressional Staff Network for Economic Advancement
February 21, 2019 – February 22, 2019 Memphis, Tennessee**

Attachments

Question #4 House Staff:

- Jared Bass, Professional Staff Member, House Appropriations Committee
- Kelsey Fetzner, Legislative Assistant, Rep. Jack Bergman
- Jason Kanter, Professional Staff Member, House Ways and Means Committee
- Heather Painter, Legislative Assistant, Rep. Conor Lamb
- Cortney Segmen, Legislative Assistant, Rep. David Trone

House staff have been invited as a result of their work on education and workforce development issues. All have responsibility over these federal issues in their offices. The site visit will highlight the successes and challenges of education, workforce and poverty programs in Memphis, TN.

Question #7 Reason for Selecting Location:

Jobs for the Future (JFF) selected Memphis, Tennessee for this site visit because of its efforts in developing its workforce and preparing its citizens for employment opportunities in high demand industries. Memphis is rebuilding its economy, hoping to engage more of its hardest to serve populations in the local job market. This visit will highlight Memphis' commitment to innovative K-12, post-secondary and workforce models that promote skill development and poverty alleviation. The visit will shed light on implications for K-12, higher education and workforce development policy, specifically on: career pathway approaches and strategies for supporting today's most vulnerable learners.

Question #12 Role of Sponsor:

Jobs for the Future (JFF) select sites and topics of interest around which to base site visits and forums, considering congressional staff interest, the quality of programming, and whether or not these programs have a relationship to workforce development, education policy and poverty alleviation specifically with a lens toward equity. JFF develops and executes the agenda; arranges logistics for the trip and communicates with staff. Lumina Foundation and The Joyce Foundation provide grants to JFF to convene the Congressional Staff Network for Economic Advancement.

Purpose of the Trip and Mission of the Sponsor:

JFF is interested in the development of education, training and supportive programs and policies that expand opportunities for low income and disconnected youth and adults to attain the education, training and credentials necessary to find good jobs and family sustainable careers. JFF's work is informed by research, analysis, and best practice. The purpose of this trip is to examine high quality and innovative education and workforce training programs that focus on the economic needs of the city, its employers and its people. Staff will see strategies the city is implementing to help inhabitants meet the skill needs of the region's critical industries, they will talk with students, teachers, state and

these programs. In addition, our funders, Lumina Foundation and The Joyce Foundation are interested in increasing pathway opportunities starting in high school through career, ensuring all populations have access to postsecondary educational attainment and supportive services through high quality and innovative approaches that meet national, state, and local economic needs.

History Carrying out Site Visits: The Congressional Staff Network has sponsored site visits and DC based forums for over 10 years. Examples of this work include the following: site visits where senior congressional staff have examined high quality workforce programs and learned from experts and practitioners on the ground, about the impact of federal policy in their fields of responsibility: Charlotte, NC; Bridgeport, CT; Cincinnati, OH; Madison, WI; Philadelphia, PA; Detroit, MI, Wichita, KS, Nashville, TN, Seattle, WA, Eastern KY, Fredericksburg, VA; and a second visit to Detroit, MI. The purpose of these trips (and the Network) is to provide in-depth learning opportunities for staff on workforce, education, and poverty alleviation issues. This year Lumina Foundation and The Joyce Foundation have provided funding for the Network.

Question #18 Good Faith Estimates for House Staff Travel and Meal Expenses:

Transportation: Round trip coach class commercial airfare from DCA (DC) → MEM (Memphis) = \$350.00 per person. On the ground transportation, via chartered coach class bus service for two days in Memphis = \$75.00 per person. Total transportation expenses = **\$425.00 per person.**

Lodging: Lodging at the Peabody Hotel for one night = **\$121.00 per person.**

Meals: Meals for two days of travel = less than **\$122.00 per person.**



AGENDA

Thursday, February 21, 2019 – Friday, February 22, 2019
Site Visit to Memphis, Tennessee

Thursday February 21st

8:50 – 10:31 AM Staff Flies to Memphis TN
 8:50 AM to 10:31 AM American 4483

10:45 – 11:15 AM Transit from Airport to Lunch session
 Central BBQ Downtown Location
 147 E Butler Ave Memphis TN
 38103

11:15 AM Lunch session
 Central BBQ Downtown Location

11:30 – 1:00 PM An Introduction to Memphis

Luncheon speakers will provide an overview of the Memphis region: the economy; its demographic characteristics; its challenges in addressing poverty and equity issues; its education and workforce development efforts; and opportunities that lie ahead. As part of this session, speakers will discuss strategies and changes underway that are designed to ensure that education and workforce development programs meet the skill needs of the region's high demand industry sectors and are accessible to all individuals in the region. This discussion will also focus on the role that federal resources (e.g., TAACCCT, America's Promise grants) have played in helping local stakeholders to rethink workforce development and postsecondary education efforts for the region. Speakers will also provide an overview of the site visit.

Speakers:

- **Reid Dulberger**, President, EDGE and the Greater Memphis Alliance for a Competitive Workforce (GMAC)
- **Dr. Elena Delavega**, Professor, University of Memphis
- **Shante Avant**, Chair, Shelby County School Board and Deputy & Director, Women's Foundation for a Greater Memphis
- **Alan Gumbel**, Interim Executive Director, GMAC

1:00 – 1:30 PM Travel to Smith & Nephew
 1450 E Brooks Rd, Memphis TN 38116

1:30 – 3:00 PM Smith & Nephew – Employer Panel on Regional Investment, Sector Initiatives and Tour of Medical Device Manufacturer

During this session staff will tour the Smith and Nephew medical device company – an advanced manufacturing company that represents the region’s leading manufacturing industry, medical device manufacturing. After a 30 minute tour where staff will have opportunities to talk with workers and see the facility, they will hear from an employer panel with representatives from Smith & Nephew, The Bartlett Chamber and the Medical Device Council to hear about how regional employers are investing in the region’s workforce and engaging in sector initiatives to build skilled worker pipelines in the region’s key industry sectors. Smith & Nephew will discuss their involvement in the local medical device council (a regional sector partnership) and about how the America’s promise grant program (a federal DOL grant) has positively impacted these efforts.

Speakers:

- **Gene Baker**, Vice President of Operations, Smith & Nephew
- **John Threadgill**, President, Bartlett Chamber of Commerce
- **Roy Smith**, President, Memphis Medical Device Council
- **Willis Yates**, President, Y & M Technologies

3:00 – 3:30 PM

Travel to Civil Rights Museum
450 Mulberry St. Memphis, TN 38103

3:30 – 5:00 PM

The Role that the Civil Rights Movement has Played in Memphis

The city of Memphis has played a pivotal role in the U.S. civil rights movement – impacting its history and economy into today. From the thriving neighborhood of Old Beale Street, to the U.S. Civil Rights Museum, the location of the assassination of Dr. Martin Luther King Jr. in 1968, Memphis has played a big role in American history. In fact, Memphis is home to three of the historic sites that comprise the US Civil Rights Trail: the National Civil Rights Museum at the Lorraine Motel in Downtown; the Clayborn Temple, the rallying point for striking city sanitation workers' iconic "I Am A Man" march; and Mason Temple Church of God in Christ where Dr. King gave his last "I've been to the Mountaintop" speech, delivered the night before his death. While great strides have been made in the city, efforts continue to focus on equitable access to good jobs and economic prosperity through the region’s education, workforce, poverty alleviation, and economic development efforts.

Speakers:

- **Ryan Jones**, Museum Educator & Lead Tour Guide, National Civil Rights Museum
- **Dory Lerner**, Museum Educator, National Civil Rights Museum

5:00 – 5:30 PM Travel back to hotel & Check - in
The Peabody Hotel
149 Union Ave. Memphis, TN 38103

6:30 – 8:00 PM Dinner Session on State Initiatives
The Peabody Hotel
149 Union Ave. Memphis, TN 38103

Staff will hear from regional representatives from Pathways TN, TN Promise, and TN Reconnect on how state initiatives are being implemented in Memphis. This conversation will include information on funding streams and outcomes these programs have seen on a regional and state level from their work.

Speakers:

- **Tracy Hall**, President, Southwest Tennessee Community College
- **Roland Rayner**, President, Tennessee College of Applied Technology (TCAT)
- **Jerre Maynor**, Director of Student Readiness and Pathways, The Broad Center
- **Rep. Mark White**, Chair of House Education Committee, TN House District 83
- **Rep. Karen Camper**, Minority Leader of Tennessee House, TN House District 87

8:00 PM Programming ends

FRIDAY FEBRUARY 22ND

8:00 – 8:30 AM Check Out of Hotel

8:30 – 9:30 AM Breakfast Session: A conversation with city and county Mayors
The Peabody Hotel
149 Union Ave. Memphis, TN 38103

Speakers:

- **Mayor Lee Harris**, Shelby County
- **Mayor Jim Strickland**, Memphis

The breakfast meeting will focus on how city and county governments work together to solve challenges facing the region, and the roles that education and workforce development play in building the regional economy as well as providing economic opportunities (ensuring equity) for all residents of Memphis and Shelby County. Mayor Harris



will provide an update on the status of the Shelby County workforce development system as it transitions to a regional workforce system.

9:30 – 10:15 AM

Hope 6 Neighborhood Tour

Clayborn Temple

294 Hernando St. Memphis, TN 38126

This session will focus on neighborhood redevelopment, inclusion and equity. Staff will be driven through a local Hope 6 Neighborhood and hear about work the Memphis Housing authority is doing as a result of their Federal Job Plus Grant and their Choice Neighborhood grant.

Speakers:

- **Marcia Lewis**, Director, Memphis Housing Authority
- **Paul Young**, Director of Housing and Community Development, City of Memphis

10:15 – 11:45 AM

Addressing Poverty and Better Serving Special Populations

Clayborn Temple

294 Hernando St. Memphis, TN 38126

During this session staff will hear from local non-profits, philanthropic organizations, and the local workforce board (WIN) who are working on varied poverty alleviation efforts including workforce development, adult education, opportunity youth, and reentry programs. Staff will hear about efforts to prepare targeted populations for success in the local labor market and strategies to provide access to high demand opportunities.

Speakers:

- **Desi Franklin**, Chair of Board of Directors, Workforce Investment Network (WIN)
- **David Jordan**, President & CEO, Agape
- **Rob Brown**, Fellow, The Collective
- **Ron Wade**, Executive Director, Hopeworks
- **Deandre Brown**, Executive Director, Lifeline to Success
- **Alexandria Smith**, Former Opportunity Youth, City of Memphis

11:45 – 12:00 PM

Travel to University of Memphis

12:00 – 1:30 PM

Lunch Session: T-STEM meeting

University of Memphis' FedEx Institute of Technology

365 Innovation Dr. Memphis, TN 38152

Working lunch where staff will hear from representatives from postsecondary education on how they are preparing students for Memphis' transportation and logistics industry, discussing the

satellite campus, a Transportation, Science, Technology, Engineering and Math (TSTEM) Highschool (that focuses on transportation) and efforts to better recruit students into STEM fields. Speakers will discuss how systems are working together to increase student interest, outcomes and persistence in these fields.

Speakers:

- **Dr. Stephanie Ivey**, Fellow and Professor, University of Memphis
- **Danielle Schnonbaum**, Director of Research, Greater Memphis Alliance for a Competitive Workforce (GMAC)

1:30 – 2:00

Travel to Southwest Tennessee Community College Health Campus
Union Avenue Campus
737 Union Ave. Memphis, TN 38103

2:00 – 3:30

Preparing Students and Workers for the Healthcare and Biotech Industry

Staff will see the Southwest Tennessee Community College Biotech and Health campus, learning from leaders in these emerging high demand sectors about how they are preparing students with skills in biotech, healthcare and related entrepreneurship.

Speakers:

- **Dr. J. Racquel Collins**, Graduate School of Biomedical Sciences, St. Jude
- **Dr. Tracy Hall**, President, Southwest Tennessee Community College
- **Beverly Robertson**, Interim President/CEO, Greater Memphis Chamber of Commerce
- **Leslie Smith**, President & CEO, Epicenter Memphis

3:30 – 4:15 PM

Wrap Up
Same location as last panel

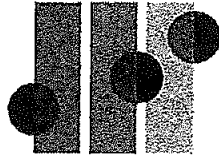
Informal discussion with sponsors and staff about key take-aways from the trip – reflecting on what was learned and ways Federal policy makers can assist states and localities to improve system alignment, programming and outcomes.

4:15 – 5:00 PM

Travel to airport

5:30 PM

Return flight to DC
Memphis → DCA 6:19 – 9:20 PM. American 5539



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Workforce Investment Network (WIN)

Alan Gumbel
Interim Executive Director
GMAC

Tracy Hall
President
Southwest Tennessee Community College

Lee Harris
Mayor
Shelby County

Stephanie Ivey
Professor
University of Memphis

Ryan Jones
Museum Educator/Lead Tour Guide
National Civil Rights Museum

David Jordan
President/CEO
Agape

Dory Lerner
Museum Educator
National Civil Rights Museum

Marcia Lewis
Director
Memphis Housing Authority

Jerre Maynor
Director of Student Readiness and Pathways
The Broad Center

Roland Rayner
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Beverly Robertson
Interim President & CEO
Greater Memphis Chamber of Commerce

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Roy Smith
President
Memphis Medical Device Council

Jim Strickland
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